

# CourtLink® eFile

**QUICK GUIDE:** 

FILE & SERVE

CourtLink® eFile Quick Guide: File & Serve

The File and Serve Quick Guide provides a convenient source of information to help you efficiently file and serve your documents into more than one case.

### **Quick Tips Before You Begin**

- 1. Refer to the appropriate court rules on electronic filing prior to using CourtLink® eFile to ensure you are in compliance with local requirements. Copies of the Rules can be found at www.lexisnexis.com/courtlink under Courts Online/CourtLink eFile or within the CourtLink eFile application under Support.
- 2. **Help** is available on the top right of the screen. When on any page of myCases, File & Serve, and Search Filings, click on that page to access Help.
- 3. Check our system requirements on **www.lexisnexis.com/courtlink** to be sure your computer is correctly configured for using CourtLink eFile.
- 4. CourtLink eFile is divided into 3 separate areas. Become familiar with the functions of the 3 main areas to help you navigate through the application:

File & Serve: To send documents to the court

File room: To retrieve documents and new service information

Information Desk: To maintain personal, firm and case status information

- 5. All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.
- 6. Hyperlinks take you to additional information don't forget to use them!
- 7. When running searches, less is more. Enter only partial information to get the most results.
- 8. The fastest way to access a filing is with a Filing ID.
- 9. When using CourtLink eFile for the first time, or if you need assistance, call our Customer Support team at 1-888-529-7587.

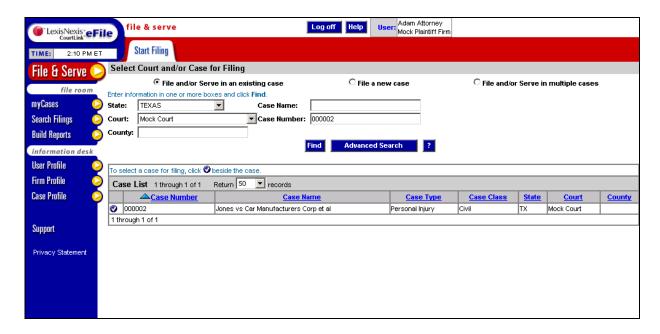
### How to Sign On to CourtLink eFile

- 1. Before using CourtLink eFile, you must have a user name and password. If you do not have these, contact our Customer Service.
- 2. Using Microsoft® Internet Explorer or Netscape® Navigator®, open your browser and go to www.lexisnexis.com/courtlink.
- 3. When the home page appears, click **Log on** under CourtLink eFile. The CourtLink eFile *Log on* page appears.
- 4. Enter your assigned user name and password and click Submit. myCases will open.

# File & Serve: Start Filing

There are 6 easy steps to submitting documents using CourtLink eFile. Each of these steps is detailed in this Quick Guide:

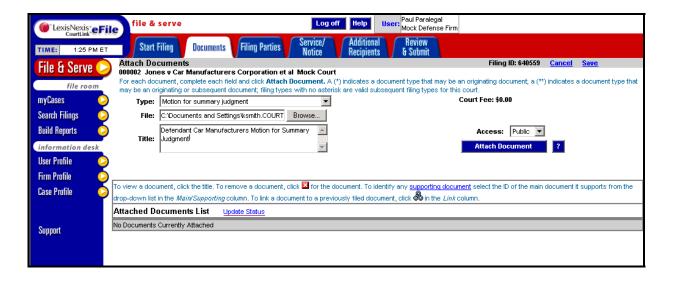
- 1. Start Filing Allows you to select a case to file and/or serve into.
- Documents Lets you select the type of document you are submitting and attach your documents.
- 3. Filing Parties Allows you to select the client for which you are submitting the document.
- 4. Service/Notice Allows you to select the recipients of the document you are submitting.
- 5. Additional Recipients Lets you add any other recipients for the document.
- 6. **Review & Submit** This is where you review your work and submit to the court and other parties.



#### FILING AND/OR SERVING ELECTRONICALLY INTO AN EXISTING CASE

- 1. To begin the filing process, click **File & Serve**. The *Start Filing* tab appears.
- 2. Select *File and/or Serve in an existing case*. An existing case is one that is already online with CourtLink eFile.
- 3. From the drop down menu, select the state and court in which you choose to file, click Find.
- 4. Enter the case number or case name in the fields available and click Find.
- 5. Cases matching your criteria will appear in the list below.
- 6. To select the case, click the box to the left of the desired case number.

### **File & Serve: Documents**



#### SELECTING DOCUMENTS

- 1. Select a filing type for your document using the drop down menu entitled **Type**.
- To attach your document, click the **Browse** button in the *File* section. A dialog box will
  open and from there you can locate the file you previously saved to your hard drive or
  network.
- 3. Enter a title for your document in the *Title* field. The title should comply with local rules for electronic filing and must not contain any punctuation.
- 4. Next select an access type for your filing public or sealed.

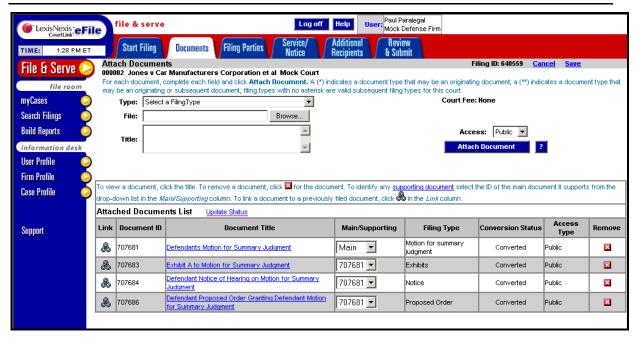
Public: The document is a publicly filed instrument.

**Sealed:** Sealed documents may be handled in one of two ways, depending on how the receiving court has opted to handle sealed instruments:

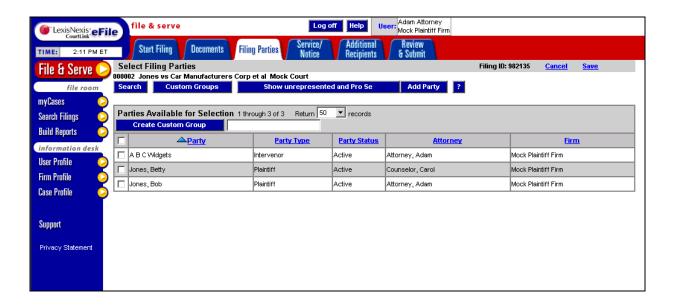
- a. The sealed document can be attached to the e-filed transaction and only available online to the court and served parties.
- **b.** The court may require that the documents be filed in hard copy with the court and that a placeholder be e-filed into the electronic docket.

Refer to your local rules for the proper method of handling sealed documents.

- 5. Click Attach Document. The document will appear in the Attached Documents list.
- 6. To add more documents, repeat steps 1-5.
- 7. When filing supporting documents, use the *Main/Supporting* feature to reflect the association. In the column next to each supporting document, select the document ID for the main document to which it supports.
- 8. If you need to remove or replace a document, click the corresponding "X" in the **Remove** column.
- 9. When all of the documents have been attached and associated, click the **Filing Parties** tab to continue.



### File & Serve: Filing Parties



#### **SELECTING FILING PARTIES:**

1. To select the party or parties you represent in this case place a check in the box next to the party name in the *Parties Available for Selection* list.

-Or-

- 2. You may search for a specific party by searching the available parties.
- 3. To search the available parties, click **Search**.
- 4. A series of search fields is available to help you find the party you are looking for.
- 5. You must place a check in the box by the party name to select that party.

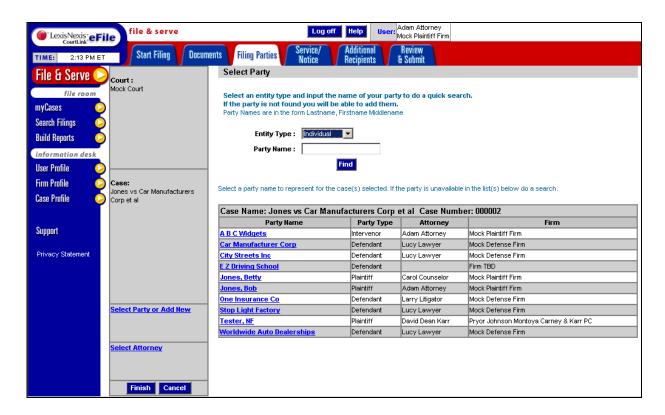
- 6. Close the search fields by clicking Close Search.
- 7. Continue with this process until you have completed the filing parties list.
- 8. You may edit your selections by selecting or deselecting the parties.
- 9. Click the Service/Notice tab to continue.

#### Filing a First Appearance or Answer for Unrepresented Parties

- 1. To file a first appearance on behalf of a party with no answer on file or an unrepresented party, click the **Show Unrepresented and Pro Se Parties** button.
- 2. Select the party(s) you are filing for by placing a check-mark next to each party.

#### Adding a Party while Filing

If the party you are trying to file for is not available in either the represented or unrepresented parties lists, you may be able to submit an Add Party request with your filing. If the court you are filing with allows this type of request with your filing, click the **Add Party** button.



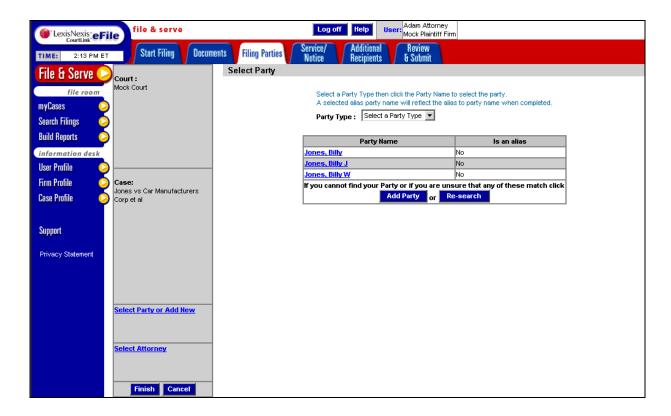
The column to the left of the screen shows the steps necessary to complete an Add Party request while Filing:

#### **Select Party:**

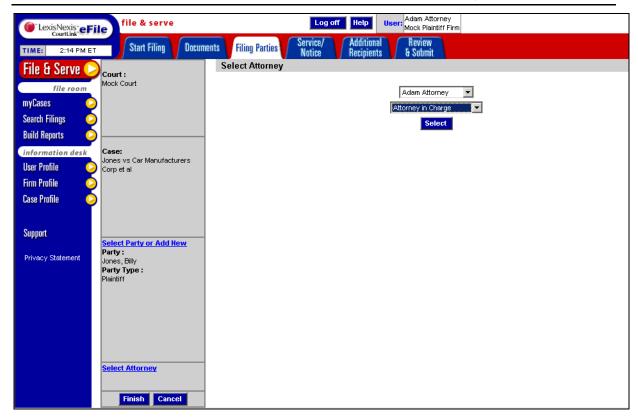
- 1. Select whether you are adding an individual or an organization
- 2. Enter the party name
- 3. Click Find

#### NOTE: When adding or searching for a party, follow these simple rules:

- For individuals, enter last name, first name (i.e. jones, billy)
- Do not include "the" in company names
- Use "&" instead of the word "and"
- Avoid punctuation in company names
- Always abbreviate Inc., Corp., and Co.
- If you want to add aliases (dba's and aka's), add them as separate parties
- Place a space between parties with initials in the name (i.e. A W Chesterson, A P Green, A I S Insurance)
  - 4. If a match is found, select the party type and click on the **Party Name** from the available list.
  - 5. If no match is found, search again using different criteria, or click **Add Party** and create a new party entry.



- 6. Select the attorney from your office that represents the party and select an attorney type.
- 7. Click **Select** when finished then click **Add to Cases**. You will be returned to the Filing Parties tab to complete the filing/service process.



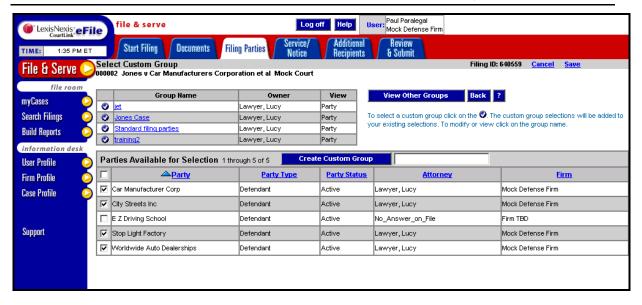
**Note:** The party you are filing for is added to the filing in a pending status. When the document is reviewed by court personnel, the added party may be accepted or rejected. Once accepted, the party status will change from pending to active. If rejected, the filer will get notice that the party has not been added. Documents in the transaction may be rejected if the Clerk's office opts to reject documents submitted by a rejected party.

#### CREATING CUSTOM GROUPS IN FILING PARTIES:

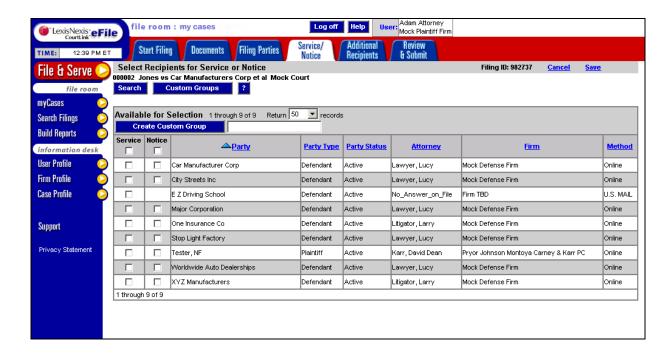
You can save your selection as a Custom **Group** for future filings. After selecting your parties, type the name of your group in the space provided – then click **Create Custom Group**.

#### USING CUSTOM GROUPS IN FILING PARTIES:

To use a custom group click **View Custom Groups**. A list of your custom groups will appear. Select the custom group you wish to use for Filing by clicking the check mark button beside the name.



### File & Serve: Service/Notice



#### SELECTING PARTIES TO RECEIVE SERVICE OR NOTICE

**Service:** A copy of the document(s) you are filing will be sent to the recipient.

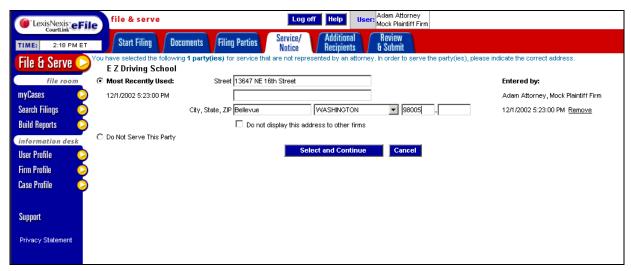
**Notice** (if available): Provides notice to selected recipients that you have filed but does not send a copy of the document you have filed. This option may not comply with your court's rules or procedure for service. Please consult the rules for your court.

1. Use this feature to choose a party or parties you want to serve or notice.

- 2. To serve or notice selectively, place a check in the corresponding box in the Service or Notice column next to the attorney names.
- 3. To select all parties, click the box below service or the box below notice. Continue until all parties you want to serve or notify are selected.
- 4. The method of delivery CourtLink eFile will use to deliver your documents is listed under the Method column.
  - If the designated recipient is a registered user of CourtLink eFile, then the
    documents or notice will be delivered to their online account.
  - If the designated recipient is not a registered user, then the documents will be delivered via traditional methods (US Mail or facsimile, depending on the rules for service for that court)
- 5. If a checkbox does not appear for you to select, then you cannot use CourtLink eFile as a delivery method to send documents to that party and will have to send service or notice to that party via traditional means.
- 6. You may search for a specific party by searching the available parties, attorneys or firms.
- 7. To search the available parties, click **Search**. A series of search fields is available to help find the party you are looking for.
- 8. You must place a check in the box next to the party name to select that party.
- 9. Close the search fields by clicking **Close Search**.
- 10. Continue with this process until you have completed the filing parties list.
- 11. You may edit your selections by selecting or deselecting the parties.

#### Serving Pro Se/Pro Per parties:

If available in the court you are filing in, you may be able to serve a Pro Se or Pro Per party by typing in a U.S. Mail delivery address. You will be prompted to enter an address for each Pro Se or Pro Per party you select to serve via regular U.S. Mail.



 The most recently used addresses will display for each party you have selected to serve. You can use the address provided or enter your own address. The source of the information will appear in the *Entered By* field.

- You can opt to share this address with other CourtLink e-filers, or you can mark it as "private" so that it will be available only to your firm.
- If you do not want to serve the Pro Se party, click the **Do Not Serve This Party** option.

**Note**: If the court you are filing into does not approve service via CourtLink eFile to a Pro Se or Pro Per party, then you will not be able to select the party and must serve the party traditionally. Service to a Pro Se/Pro Per party via CourtLink eFile will be completed via regular U.S. Mail. If this does not meet your needs, then please serve the party traditionally.

12. Click the **Additional Recipients** tab to select additional recipients and continue in the filing process.

-Or-

13. You may click the **Review and Submit** tab to complete the filing without selecting additional recipients.

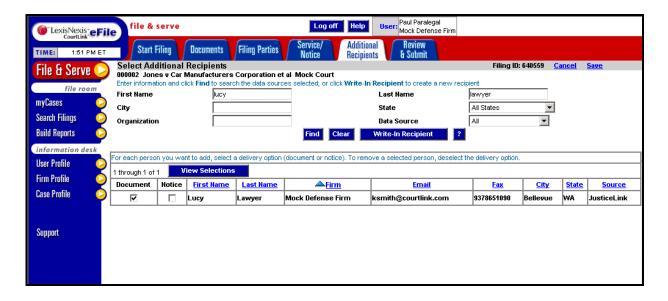
#### CREATING CUSTOM GROUPS IN SERVICE/NOTICE

You can save your selections as a Custom Group for future filings. After selecting your parties, type the name of your group in the space provided – then click **Create Custom Group**.

#### USING CUSTOM GROUPS IN SERVICE/NOTICE

To use a custom group click **View Custom Groups**. A list of your custom groups will appear. Select the custom group you wish to use for your filing by clicking the check-mark button beside the name.

# File & Serve: Additional Recipients

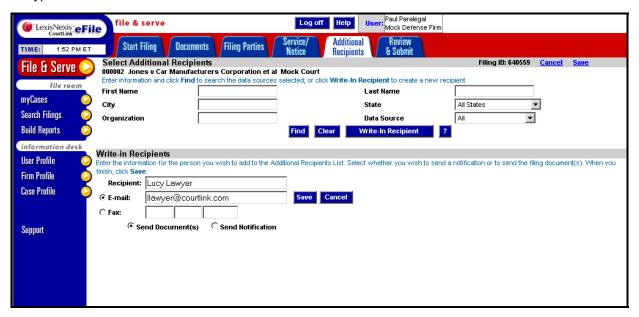


#### SELECTING ADDITIONAL RECIPIENTS

You may choose to add additional recipients to your transaction.

- 1. Use the search feature to find recipients from our databases.
- Enter the search criteria in at least one of the search fields and click Find. A list of
  matching individuals will appear. The list will include individuals from the CourtLink eFile
  database (in bold) and from any other source you selected.
- 3. For each recipient you want to add, select a delivery option (service or notice). If more than one entry appears for an individual, select the entry with the CourtLink source as that indicates the recipient is a subscriber and wants delivery online.
- 4. To verify your selection click the View Selections button.

To type-in individuals not found in the search above:



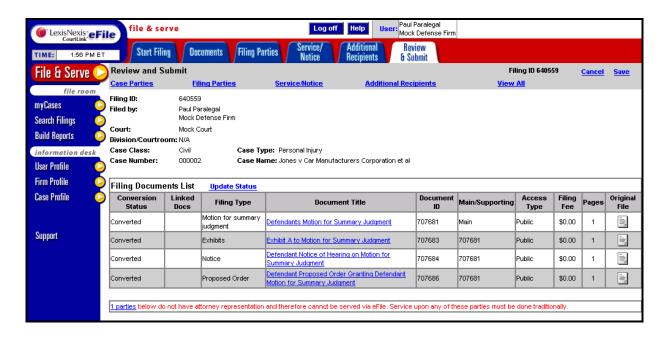
- Click the Write-in Recipient button. The Write-in Recipients form appears on the lower part of the page.
  - a. Enter the recipient's full name.
  - b. Select **E-mail** or **Fax**, and provide an address or fax number.
- 2. Select a delivery option (send documents or notification).
- 3. Click **Save**. The party is added to the *Additional Recipient* list.

To write in another recipient, repeat steps 1–3.

4. Click the **Review & Submit** tab.

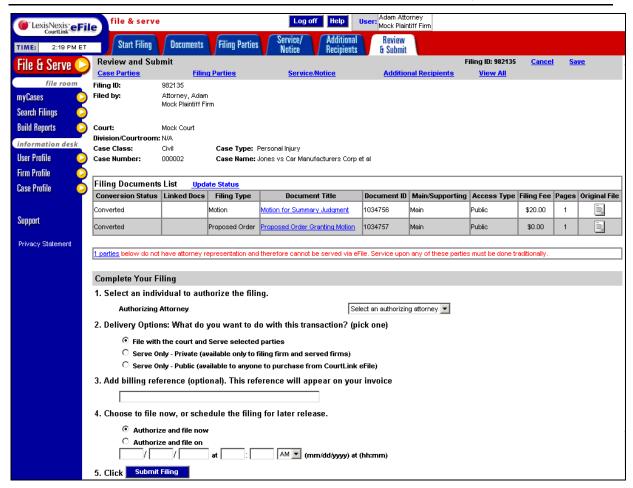
**NOTE:** LexisNexis™ CourtLink® cannot guarantee delivery if the information you provide is incomplete or incorrect.

### File & Serve: Review and Submit



#### AUTHORIZING AND SUBMITTING THE FILING

- 1. Check all information on the filing summary.
- 2. Make any changes to the filing on the appropriate tab; then return to the *Review and Submit* page.



- 3. From the drop down menu select the name of the individual authorizing the filing.
- 4. Delivery Options select from the following options:
  - File and Serve: The transaction will be filed with the court and served to all
    designated recipients. It will be available to be viewed and purchased by registered
    CourtLink eFile users as a publicly-filed instrument
  - Serve Only Private: Sends the transaction ONLY to your selected service recipients. The document IS NOT filed with a court. It is not available to any registered CourtLink eFile users that you did not select for service, and may not be viewed or purchased as a publicly filed document.
  - Serve Only Public: Sends the transactions Only to your selected service recipients. IS NOT filed with a court. Is available to be searched, viewed, printed and purchased by any registered CourtLink eFile users as a publicly available document.
- 5. Next, enter any billing information you want included on your invoice.
- 6. You can choose to authorize and file your documents now, or you may choose to enter a future date and time for the document to be automatically sent.
- Click Submit to submit your transaction to the court and serve or notice your chosen parties.
- 8. A CourtLink eFiling receipt appears containing your filing "stamp" print a copy for your records.

# File & Serve: Filing Receipt

To view a filing receipt report with *all* filing details, click the **View All** link and print that page for your records.

